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Türkiye'nin Internet'i ve Bölgedeki Yeni Gelişmeler

Jim Cowie, CTO
TRNOG-2, June 2012

Turkey is a True Regional Internet Power

- New terrestrial connectivity projects such as RCN, JADI, and Iraqi connectivity are connecting Turkey to the GCC

- Superonline is now a transit provider to the Iranian incumbent DCI (since April 2012)

- Turk Telekom provides transit to Newroz in Iraq

- Superonline provides transit to IQ Networks in Iraq

- Turkish transit also plays a role in Cyprus, Georgia, Azerbaijan, .. the list grows each year.

Turkey's Global Rank (June 2012)

- Renesys ranks countries according to their *total routed space*
- Same computation underlying the Renesys Market Intelligence Customer Base Score
- Turkey has fallen three places in the last year, from #20 – *why?*

- 18. Spain
- 19. Argentina
- 20. Hong Kong
- 21. Thailand
- 22. Poland
- **23. Turkey**
- 24. Sweden
- 25. Ukraine

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Domestic Autonomous Systems, 2006-2012

- "Domestic" ASNs have at least 70% of their total customer base score in the given country

- Global growth slowed 2009-2012 due to economics

- Bulgarian growth is much higher than Turkey's – *why?*
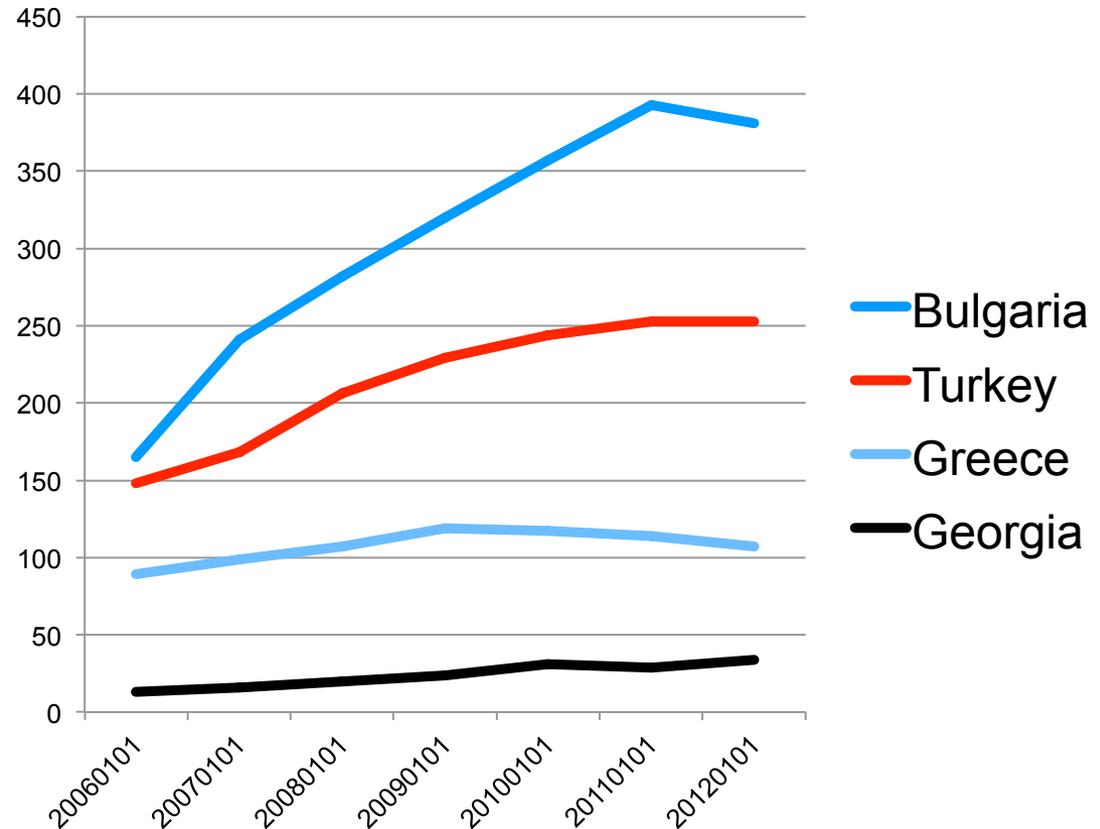
Bulgarian Market Diversity: Much Higher

TURKEY

Population: **73M**

Domestic ASNs: 253

National on-net %pct:

- Turk Telekom: **96%**
- Superonline 34984: 23%
- Turkcell 16135: 10%
- Vodafone 15987: 7%

BULGARIA

Population: 7M

Domestic ASNs: **376**

National on-net %pct:

- Bulgarian Telecom: 33%
- Spectrum Net: 18%
- Lirex: 13%
- Cabletel: 13%
- …..

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Turkish Transit Has Strong Competition

- Georgia-Bulgaria for Caucasus traffic

- Russia for Iran/Iraq, Asian, Gulf traffic to Europe

- Egypt for global east-west traffic

- *These are all growing faster than Turkey – Why?*

Incumbent Dominance and ASN Growth

Country	Domestic ASN Growth 2006-2012	On-net Percentage of Largest Provider	Largest Provider
Russia	332%	41%	Rostelecom
Georgia	192%	26%	Caucasus Online
Egypt	183%	45%	Telecom Egypt
Bulgaria	159%	33%	Bulgaria Online
Turkey	**85%**	**96%**	Turk Telekom

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Hypothesis: Domestic Peering Is Critical

- Unless domestic providers interconnect, new market entrants tend to simply pick the largest provider

- Many new market entrants will remain single-homed or skip the ASN step altogether, reducing market growth and diversity further

- Without domestic peering, domestic traffic may incur extra latency penalties, create national security vulnerabilities by passing through foreign IXPs

- Improving peering would drive IT sector growth, improve Turkey's regional competitiveness

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